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FEDERAL STUDENT AID SM

ATTACHMENT F - ACQUISITION BACKGROUND & SAMPLE TASK ORDER REQUIREMENTS

Sample Task Order

**Enterprise Development Support Services (EDSS)
Enterprise Program/Project Management Support
Services**

AUTOMATED PROPERTY PASS SYSTEM (APPS)

Performance Work Statement

Version 1

January 9, 2008

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1. INTRODUCTION

Federal Student Aid (FSA) (<http://federalstudentaid.ed.gov/>), a principal office of the Department of Education (DoED, <http://www.ed.gov/>), ensures that all eligible individuals can benefit from federally funded or federally guaranteed financial assistance for education beyond high school. FSA consistently champions the promise of postsecondary education and training to all Americans – and its value to our society.

FSA plays a central and essential role in the American community of postsecondary education. We partner with postsecondary schools and financial institutions to deliver programs and services that help students finance their education beyond high school. Today, FSA is responsible for a range of critical functions that include, among others:

- Processing millions of student financial aid applications;
- Disbursing billions of dollars in aid funds to students through schools;
- Enforcing financial aid rules and regulations;
- Partnering with schools, financial institutions and guaranty agencies to prevent fraud, waste and abuse;
- Educating students and families about the process of obtaining aid;
- Servicing millions of student loan accounts;
- Informing borrowers of their repayment options and obligations and securing repayment from those who have defaulted on their loans; and
- Operating information technology systems and tools that manage billions of student aid dollars.

Designated as a Performance-Based Organization (PBO) by Congress in 1998, FSA emphasizes tangible results and efficient performance, as well as the continuous improvement of the processes and systems that support our mission. Our community of stakeholders includes students, parents, schools, lenders and guaranty agencies, as well as other federal entities and the Department of Education (“the Department”) itself. (<http://www.ed.gov/about/bdscomm/list/acsfa/jan99brief/edlite-PBO.html>),

FSA is headquartered in Washington, DC and has ten (10) regional offices throughout the United States to support its customers. FSA implements the PBO legislation and our Strategic Objectives, in alignment with the Presidential Management Agenda as documented in our “FY 2006-2010 Five-Year Strategic Plan”. (<http://www.ed.gov/about/offices/list/fsa/06-10performanceplan.pdf>).

The following are the core objectives that FSA uses as performance standards for the organization and all supporting contractors:

- (1) To integrate FSA systems and provide new technology solutions to deliver federal student aid in an efficient and cost effective manner;
- (2) To improve program integrity to ensure access to postsecondary education, while reducing vulnerability to fraud, waste and abuse;
- (3) To reduce program administration costs to improve control over resources and maintain accountability for results;
- (4) To improve human capital management; and
- (5) To improve products and services to provide better customer service.

1.A. Federal Student Aid’s Office of the Chief Information Officer (FSA CIO)

This office has developed plans and strategies to integrate and modernize the information technology landscape at FSA in order to better meet our mission and strategic objectives. FSA has

established targets to support the modernization of the Office's programs and operations. The objectives of the FSA CIO's plans are to:

- Provide high-quality, reliable infrastructure operations;
- Implement flexible business and technical architectures, such as Service Oriented Architecture (SOA), design principles and solutions;
- Improve service to business units by anticipating and quickly delivering flexible, innovative solutions to their business needs;
- Implement security management processes and solutions that meet business needs while ensuring the protection of privacy data; and
- Improve program management and oversight.

These objectives ensure that FSA meets its primary mission of "Ensuring that all eligible individuals benefit from federal financial assistance—grants, loans and work-study programs—for education beyond high school. By championing the promise of postsecondary education, we uphold its value as a force for greater inclusion in American society and for the continued vitality of America as a nation."

FSA CIO's ability to meet these objectives depends on a number of environmental, programmatic, and technological drivers. Environmental drivers stem from changes in the volume of student and recipient populations and the changes in students' and parents' expectations and demands for services.

Programmatic drivers are reflected in shifts in the role of need-based aid, changes in the student loan programs environment, ensuring that the "right funds get to the right people at the right time", ensuring proper program integrity and controls are in place, and the need to simplify the process of applying for and receiving aid. Programmatic drivers also derive from existing and recent legislative mandates, such as the Higher Education Reconciliation Act of 2005, changes that will be made with the Reauthorization of the Higher Education Act of 1965, and from initiatives such as the "National Dialogue: The Secretary of Education's Commission on the Future of Higher Education (<http://www.ed.gov/about/bdscomm/list/hiedfuture/index.html>), or commissions implemented by the Secretary of Education such as the Advisory Committee on Student Financial Assistance (<http://www.ed.gov/about/bdscomm/list/index.html?src=ln#sfw>) which can alter the types of student financial assistance available and their methods of delivery.

Technology drivers, which include Internet capabilities and scalable, robust computing infrastructures, will help the FSA Information Technology (IT) infrastructure achieve improvements in responsiveness, flexibility, service delivery, security, and cost. Changes in technology impact not only the manner in which services and products can be delivered, but also the expectations of our customers and other stakeholders.

Over the past few years, FSA has begun accomplishing its IT objectives by creating a new technical architecture for system development, and moving all of the development and operations infrastructure required to support FSA to a single Virtual Data Center (VDC). Resident at the VDC is the Enterprise Application Integration/Integrated Technical Architecture (EAI/ITA) infrastructure for enterprise application hosting and system operations. Where possible, FSA is in the process of expanding the use of reusable enterprise assets to support the technical needs of our business, thereby increasing standardization, efficiency, and reuse. More information about the VDC and EAI/ITA can be found on the Acquisition Website, <https://fsaacquisitioninformation.ed.gov/>.

For IT-related reference materials such as Federal regulations, departmental directives, standards, work guides, and handbooks, please review postings on FSA CIO's Library website at

<http://www.fsa.ed.gov/business/library.html>.

1.B. Federal Student Aid's Enterprise Performance Management Services Office (FSA EPMS)

This office is responsible for providing best in business service for all systems integration, reengineering and re-platforming projects; efficient and economic acquisition of products and services; contract performance measures and measurement; performance plan monitoring; internal review; audit resolution; risk assessment; risk management strategy; and monitors FSA performance in high-risk issue areas.

To accomplish this mission, EPMS has four (4) principal groups:

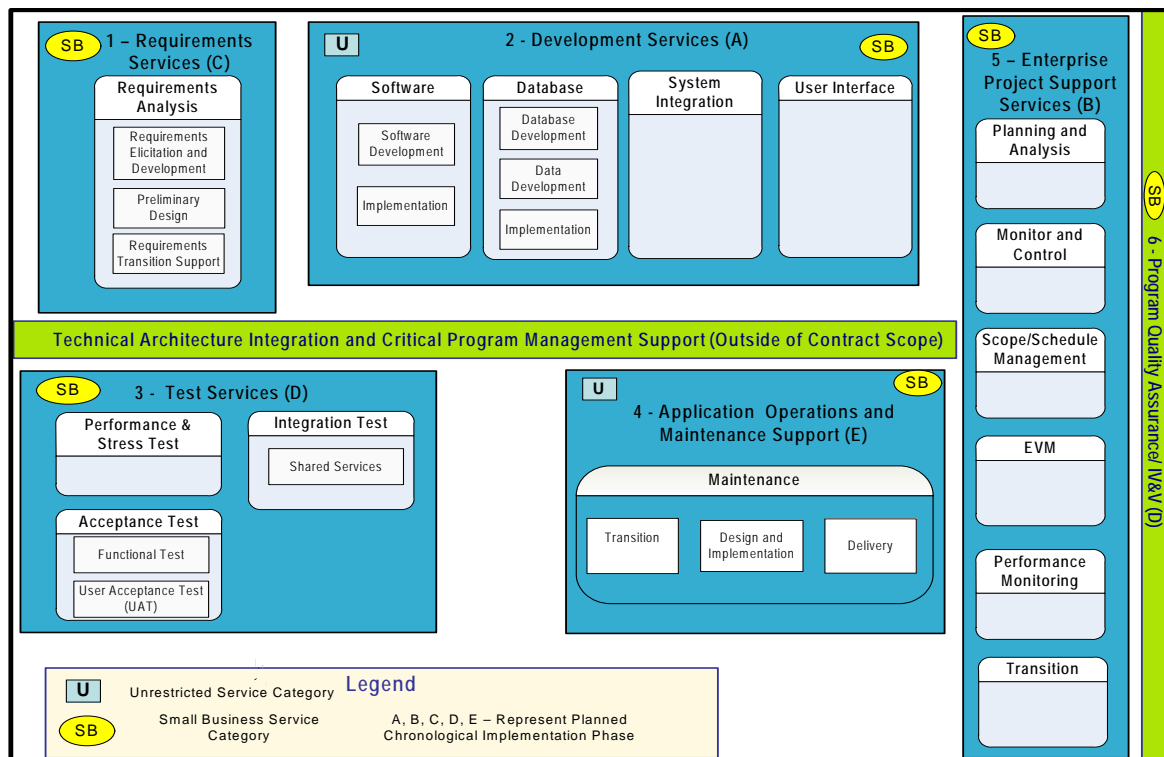
- (1) Project Management and Oversight Group: responsible for promoting the development and diffusion of a project management culture throughout FSA. The group advises on systems integration strategy and annual strategic and tactical planning for FSA initiatives.
- (2) Acquisitions Group: responsible for ensuring the efficient and economic acquisition of products and services for FSA while reducing costs and maintaining compliance with applicable laws, regulations, and Executive Orders. The group's functions include: planning, policy and analysis; contracts; and purchasing operations.
- (3) Strategic Planning and Reporting Group (SPAR): responsible for providing long and short-term planning, performance measurement and reporting, and programmatic data analysis support to the FSA organization. These critical planning, analysis and reporting functions not only help FSA meet performance goals, but also facilitate compliance with planning and reporting requirements detailed in the PBO enabling legislation.
- (4) Enterprise Risk Management Group (ERMG): responsible for providing risk management oversight and guidance to FSA and performs internal reviews and risk assessments as appropriate or as requested by senior management. ERMG is responsible for driving strategy and plans for assessing, monitoring and addressing risk associated with FSA, its programs, systems contracts and external partners. ERMG is also responsible for audit tracking and resolution for FSA.

2. ENTERPRISE DEVELOPMENT SUPPORT SERVICES (EDSS) MODEL

FSA has developed the EDSS Model to support an enterprise approach for acquiring, managing the development of, and implementing and maintaining enterprise system development projects in compliance with the FSA standards and guidelines and the Department's Lifecycle Management Framework (LCM) Version 1.0 (See http://connected.ed.gov/doc_img/acs_ocio_1_106.doc).

Compliance with the policies, processes, procedures, templates, standards, and guidelines set forth in these documents (and all future iterations and versions) will ensure that current and future system/application development will meet FSA's IT mission objectives.

Figure 1 depicts the Service Areas in the EDSS Services Model. The Model covers the major sets of services, some aligning with the life cycle of systems and application development, in order to develop and deliver IT support to Federal Student Aid's business functions.



The EDSS model is comprised of six (6) service areas (SA's), as follows:

1. Service Area 1 (SA-1) – Requirements Services
2. Service Area 2 (SA-2) – Development Services
3. Service Area 3 (SA-3) – Test Services
4. Service Area 4 (SA-4) – Application Operations and Maintenance Services
5. Service Area 5 (SA-5) – Enterprise Project Support Services
6. Service Area 6 (SA-6) – Program Quality Assurance & Independent Verification and Validation (IV&V) Services

Each EDSS Service Area is comprised of functions that deliver those capabilities for life cycle tasking as defined by Federal Student Aid (or the Department, as applicable). To ensure maximum flexibility and risk mitigation in terms of transitions there is some overlap in service areas (in particular Service Areas 1 and 2, and 2 and 4). This approach allows for some periods of concurrent activity across the service areas, either to aid transition or to support possible iterative development efforts. Specific requirements, scope and details of delivery of these functions will be governed by task orders.

A task order may contain one or more tasks or functions that are otherwise represented in one or more of the Service Areas, and that TO may impact one of more development initiatives. Federal Student Aid (or the Department, as applicable) may choose to release a separate Task Order Request for Proposal (TO RFP) for each task within a Service Area, or combine several functions under a single task order.

For example, for a single initiative, Federal Student Aid (or the Department, as applicable) may issue three individual task orders as follows: Task Order 1 for the development of User Interface; Task Order 2 for the development of an exposed service that delivers a business function; and Task Order 3 for the development of a data store to support a single "system." Conversely, Federal Student Aid (or the Department, as applicable) may issue a only one task order that requires the development services for a single or multiple initiatives. Consequently, one contractor from one of the Service

Areas may have a task order that involves multiple initiatives that otherwise represent services associated with one or more of the other Service Areas.

Each TO will have specified deliverables that rely on documented standards, guidelines, and measures. The junctures and dependencies between more than one Service Area may require transition points among the multiple contractors from the various Service Areas and these transition points requires clearly defined exit criteria. At any given time, Federal Student Aid (or the Department, as applicable) of Education management may decide that it is in the best interests of the Government to continue or discontinue an effort (initiative or project), combine it with other efforts, or postpone any action concerning the project, task or subtask; and contractual remedies may apply.

The mission of the EDSS is to establish a cadre of highly qualified, adaptable, and motivated contractor/partners with strategic vision in their core competencies and demonstrated capability to excel in an integrated and collaborative environment that delivers products and services essential to FSA's business owners to successfully execute the government's strategic mission.

2.A. Purpose

The purpose of this solicitation is to acquire enterprise-wide portfolio management business process support services for the Department. This encompasses two (2) Services Areas of the Enterprise Development Support Services (EDSS) Model:

- 1) Enterprise Project Support Services (SA-5)
- 2) Program Quality Assurance and Independent Verification & Validation Services (SA-6)

2.B. Objective

It is the intent of Federal Student Aid (FSA) to eventually use the multiple award vehicles established for each Service Area as defined by the EDSS model as the primary vehicles by which the support services for enterprise portfolio management business process efforts are acquired.

It is the intention that this scope of services required by FSA will be competed among the qualified contractors after the IDIQ contracts are awarded. FSA will use these IDIQ contracts and all of the multiple award vehicles supporting the other Service Areas of the EDSS model as long as these contract vehicles best meet the needs of FSA.

However, the resultant IDIQ contract(s) is a non-exclusive contract vehicle for acquiring technical and management support services. The Government reserves the unilateral right to fulfill its Independent Verification & Validation, Program Quality Assurance & Enterprise Quality Management, Program & Project Management Acquisition Management, and Investment Management support services requirements through any other acquisition and/or contract vehicle(s).

2.C. Service Areas

The scope of services that contractors shall be expected to perform within resultant task orders against these IDIQ contracts include the following examples:

- Investment Management - the contractor shall provide personnel, resources, tools, and facilities, as appropriate, to provide efficient and cost effective investment management support services for the requirements listed below.
 - o Lifecycle Cost Estimating Support - provides advice, recommendations, and document support to multiple offices in all areas of developing lifecycle costs of alternative solutions that meet the requirements of the proposed programs. This effort includes assisting program offices in researching and development of notional architectures, appropriate ground rules and assumptions, defining lifecycles and

- refresh cycles, and implementation, transition, maintenance and decommissioning scenarios.
- Lifecycle Benefits Estimating Support - provides advice, recommendations, and document support to multiple offices in all areas of developing lifecycle benefits of alternative solutions of the proposed programs. This effort includes assisting program offices in researching and development of appropriate ground rules and assumptions, quantitative and qualitative benefits.
 - Business Case Analysis and Preparation Support - provides advice, recommendations, and document support to multiple offices in all areas of developing business case analysis and OMB Exhibit 300s for alternative solutions that meet the requirements of the proposed programs. This effort includes assisting program offices in preparing the appropriate economic, financial, operational and technical analyses that are required to complete OMB Exhibit 300s. Proper completion of the OMB Exhibit 300 requires the analysis of 3 alternative technical solutions as well as a status quo analysis, which justify the selection of the recommended solution.
 - Acquisition Management - the contractor shall provide personnel, resources, and facilities, as appropriate, to provide efficient and cost effective acquisition support services for the requirements described below.
 - Requirements Documentation Support - provides advice, recommendations, and document support to multiple offices in all areas of the acquisition requirements phase. This effort includes assisting program offices in researching and drafting specifications and standards, including Performance-based Work Statements (PWS); developing performance measures, providing consultation and recommendations; and coordinating requirements documents. Develop evaluation criteria.
 - Acquisition Strategy Support - provide advice and recommendations for all elements in acquisition plans, including approaches, options, strategies, risks, contracting methods, competition, sources, cost, milestone schedule, etc. Research existing Government- wide contracts for available products and services. Evaluate different approaches to and sources for acquisition support. Research available suppliers and compare the services and costs of obtaining support from the different providers. Determine applicability of the Economy Act.
 - Market Research and Market Surveys - assist in conducting market research to identify potential sources and contract vehicles. Potential sources should include socio-economic program participants (i.e., small businesses, small and disadvantaged businesses, HUB Zone businesses). Potential vehicles should include GSA Schedule vendors, Government-wide Agency Contracts, and other agency contracts. Conduct market surveys and prepare written documentation of market research. Support program offices in documenting small business capability analysis. Prepare FedBizOpps and other electronic posting announcements.
 - Pre-Award Documentation and Source Selection - assist in evaluation process and assure written documentation to support source selection procedures.
 - Solicitations - prepare Request for Quotes (RFQs), Request for Proposals (RFPs), and Combined Synopsis/Solicitations. Assure the solicitation includes all appropriate solicitation terms and conditions. Recommend and prepare unique terms and conditions as required. Prior to release of solicitation, verify that funds are available and obtain legal concurrence. Release solicitation by electronic posting, email, fax or mail.
 - Contract Award - work with evaluators and Contracting Officer (CO) to identify pre-negotiation objectives and assist the CO with discussions with Offerors. Prepare final contract award documents for task and delivery orders and stand-alone contracts, and Contracting Officer Technical Representative (COTR) designation letters. Obtain legal concurrence. Distribute contract to appropriate parties. Input award data into the Federal Procurement Data System (FPDS).

- Post-award Support - prepare appropriate documentation for the exercise of options, prepare modifications, and assist in the resolution of performance problems.
- Program and Project Management – the contractor shall provide personnel, resources, tools, and facilities, as appropriate, to provide efficient and cost effective program and project management support services for the requirements outlined below.
 - Project integration planning (Scope, Schedule, and Cost Baselines),
 - Resource analysis, planning, and management,
 - Schedule development, management (including integration where necessary) and analysis,
 - Risk planning, analysis and management,
 - Quality planning and management, and performance planning.
 - In addition, the contractor shall provide services to support SSC project control, monitoring, and closeout services. Examples include:
 - Earned value management (planning and execution),
 - Project change control, project remediation, and process improvement.

The contractor may also be directed to provide organizational assessments and development support services. Examples include: FSA workforce planning, alignment, and development, change management, PMO governance and procedures, and process development and improvement.

- Independent Verification & Validation – the contractor shall provide personnel, resources, tools, and facilities, as appropriate, to provide management visibility into development efforts through established Independent Verification & Validation (IV&V) methodologies as outlined in the FSA Quality Assurance Handbook, Version 3, dated February 15, 2006 (flexibility of areas of focus based on management priorities, risk assessment and available funding). The IV&V contractor will provide support through development, implementation and operational activities. Specific tasks may include:
 - Identify, analyze and track risks to the development project sufficiently and early enough to allow for timely risk mitigation actions;
 - Review and evaluate development technical architecture and system development activities for consistency with Federal Student Aid, Department of Education, and Government standards;
 - Evaluate project development activities as they relate to contractual requirements and the developer's technical proposal.
 - Support Stage Gate Reviews that are required by the Life Cycle Management (LCM) Framework by reporting on: 1) quality and completeness of stage deliverables/exit criteria, 2) issues relating to the readiness of system development to enter the data center production environment during Data Center Operational Readiness Reviews (ORR), and 3) risks and quality issues raised during Federal Student Aid's Production Readiness Reviews (PRR), including a "go" or "no go" recommendation from the IV&V contractor for each PRR.
 - Evaluate the project developer's core system development activities, including but not limited to: Change Management, Configuration Management, Requirements Management (including review, analysis and traceability), Test Management, and Quality Management.
 - Report on compliance of developer's processes to industry standards (e.g., Capability Maturity Model - Integrated or International Standards Organization issued standards) included in the developer's technical proposal and applicable government standards.
 - Analyze project controls to determine if financial calculations, processes, procedures, and reports function as planned, meet the needs of Federal Student Aid Management, and meet applicable Federal Standards.

- Report deficiencies and reevaluate changes made to the system, until adequately addressed.
- Perform maintainability assessment of each LCM phase to ensure all maintenance activities are planned for and / or in place.
- Provide security support services including the following tasks:
 - Conduct independent security risk assessments and review resulting Corrective Action Plans.
 - Evaluate the comprehensive Security Program with priority given to the current Security Plan and Memorandum's of Understanding (MOUs) that delineate and agree upon security issues involving systems interfacing with FSA.
 - Evaluate and monitor security deliverables such as Security Plan Analysis, System Risk Assessment, Recovery Plan Analysis, System Rules of Behavior Analysis, and Migration Plan Analysis.
- Develop and execute action plans for accomplishing risk mitigation activities based upon government-established priorities. Risk mitigation work packages represent logical groupings of security initiatives and consist of the following:
 - Technical and operational controls including ID and password management, access monitoring, and more restrictive use of administrator and super user permissions
 - Security management with the system management process including security testing, integration of security reviews with the change control process, and security incident reporting.
 - Technical analysis on current disaster recovery programs from a security perspective including tests in accordance with the roles and responsibilities previously established with the respective data centers.
- Assist FSA in preparing systems for certification and accreditation. The contractor shall:
 - Review and provide comments to improve Certification and Accreditation project plans, security test and evaluation plans, and security documentation.
 - Meet with the authoring entities of the system's security plans and documentation to walk through their comments and provide additional recommendations that will improve a systems security. Security documentation includes system security plans, configuration management plans, disaster recovery plans, and contingency plans.
 - Create a viable security assessment plan for producing and compiling the information necessary to determine the effectiveness of the security controls employed within the information system utilizing the assessment procedures from NIST Special Publication 800-53A as a starting point.
 - The security assessment plan must define a complete assessment of all security controls in the information system and site visit requirements (# as required) and shall be approved by Federal Student Aid before an audit may commence.
 - Conduct the security assessment in accordance with the approved security assessment plan. This will include application level vulnerability scans, security documentation reviews, interviews, and observations. Contractor shall provide assessment results in the approved Federal Student Aid format. Each security weakness identified will include the NIST SP 800-53 control area and a recommendation for mitigation.

- Conduct independent testing of phased releases and risk based testing.
- Participate in system and application testing activities and coordination meetings with Federal Student Aid and the development contractor. Specific tasks may include:
 - Conduct detailed system test planning and analysis to support FSA test program.
 - Support the preparation, execution and analysis of FSA application acceptance testing.
 - Monitor and observe development contractor testing activities from unit testing through integration testing.
 - Support and participate in acceptance testing with the FSA acceptance test teams.
 - Support and monitor regression testing activities with the FSA test teams.
 - Support and monitor configuration management activities in relation to FSA application testing efforts.
 - Support the test readiness review process and attend test readiness reviews. Review test metrics and performance.
- Program Quality Assurance and Enterprise Quality Management - the contractor shall provide personnel, resources, tools, and facilities, as appropriate, to provide efficient and cost effective program quality assurance support on specific task objectives and report directly to the Government. Specific tasks may include:
 - Evaluate performed processes, work products, and services against the applicable process descriptions, standards and procedures.
 - Review and evaluate development technical architecture and system development activities for consistency with Federal Student Aid, Department of Education, and Government standards.
 - Identify, analyze and track risks to enterprise quality processes sufficiently and early enough to allow Federal Student Aid to take timely risk mitigation actions.
 - Evaluate project development activities as they relate to contractual requirements and the developer's technical proposal.
 - Support Stage Gate Reviews that are required by the Life Cycle Management (LCM) Framework by reporting on: 1) quality and completeness of stage deliverables/exit criteria, 2) issues relating to the readiness of system development to enter the data center production environment during Service Delivery Reviews (SDR) and 3) risks and quality issues raised during Federal Student Aid's Production Readiness Reviews (PRR), including a "go" or "no go" recommendation from each PRR.
 - Evaluate the project/program core system activities, including Change Management, Configuration Management, Requirements Management (including review, analysis and traceability), Test Management, and Quality Management.
 - Report on compliance of developer's processes to industry standards (e.g., Capability Maturity Model - Integrated or International Standards Organization issued standards) included in the project technical proposal and applicable government standards.
 - Provide support for Post Implementation Reviews (PIR) of IT initiatives to ensure that IT investments have achieved performance, cost and schedule goals.
 - FSA CIO is charged with carrying out provisions of the Clinger-Cohen Act of 1996 (Public Law 104-106) relating to Capital Planning and Investment Control (CPIC) of Information Technology. Part of the Evaluate Phase of the CPIC process requires that federal agencies conduct Post Implementation Reviews (PIRs) of IT Investments. These investments at Federal Student Aid range in size from \$10,000 to over \$500 million. Over the past four years, the Enterprise Quality Assurance Team within Federal Student Aid's CIO has

institutionalized a repeatable process for conducting PIRs on investments of all sizes.

As identified in the department's Work Products Guide and LCM Framework (see reference materials), the contractor shall be responsible for producing and delivering the specific deliverables for each stage (Initiative, Definition, Construction & Validation, and Implementation) under the direction of the agency's program or project manager.

3. SAMPLE TASK ORDER

3.A. Purpose

This requirement is to acquire management and support services for Federal Student Aid's (FSA) Automated Property Pass System (APPS) initiative. This initiative will automate the current paper property pass system and integrate it with the Department of Education's Asset Management database.

3.B. Background

U.S. Department of Education (ED) requires documentation signed by an authorized individual to accompany the removal of any of its fixed or IT assets from ED's leased and owned buildings. ED prohibits the removal of inventoried assets from its facilities without a valid property pass.

FSA uses a paper-based property pass system to authorize individuals (all FSA staff and contractors who will be on site for more than two business days) to take property out of Union Center Plaza, FSA's Headquarters building. Nineteen employees in Union Center Plaza (UCP) have the authority to sign property passes. Individual property passes are issued for a specified period of time and are issued for any property with a bar code. After issuing the paper property pass, the Property Pass Signer captures the information in their own log (paper or electronic). Employees and contractors must give a copy of their property pass to UCP Security staff; copies are maintained in the building security property pass log. All Visitors and contractors who will be at UCP two days or less are required to register personal items or business assets (such as a laptop) with the UCP security staff upon check-in, but are not issued property passes.

FSA property information is stored in ED's Asset Management database by FSA Asset Managers. Employees notify FSA Asset Managers when an asset is returned, damaged, missing or stolen, and this information is logged into the database. The database stores such information as the user's name and the product serial number/bar code, but it doesn't capture all property pass information or track equipment when it is taken out of the building. FSA Asset Managers are not authorized to sign property passes as a designated internal control implemented by ED.

ED policy requires UCP Security staff to check that each person leaving the building has a property pass for any equipment removed from the building. Often times, this policy is not practiced because it is not always apparent that property is being taken out of the building; often the piece of equipment is concealed in a brief case or other bag.

FSA uses GSA's Optional Form 7 for its property passes. The form has nine data elements, as follows:

- Date Issued
- Name (person's name and Business Unit)
- Building (Union Center Plaza)
- Description of Property Being Removed (Item, Manufacturer, Model, Serial #, Barcode)

- Property Belongs To (ED/FSA)
- Department or Agency (U.S. Department of Education)
- Signature of Person Authorizing Removal of Property
- Title of Authorizing Person
- Pass Good Until (not to exceed 6 months)

3.C. Goal

The APPS initiative is at the preliminary stage of the Department's Lifecycle Management (LCM) Framework (see reference materials). The general areas of support required by FSA Project Management under these task orders are as follows:

- Program and Project Management
- Investment Management
- Acquisition Management
- Independent Verification & Validation

The goal of this support is to assist the FSA Project Manager, to the maximum extent possible, to automate and integrate the paper property pass system that ensures accountability for and tracking of portable FSA equipment.

3.D. Scope

Here are the requirements for this automated property pass system, at a minimum:

- Capture the same data elements as in the current paper property pass GSA Optional Form 7.
- Integrate the system with ED's Asset Management Database
- Support the printing of a paper property pass form as a backup.
- Support management reporting capabilities.

Finally, this system must be unobtrusive and support limited guard interface – i.e., guards will not stop every piece of portable property but will instead do occasional spot checks and will stop property deemed unusual or suspect. For guard spot checks, the system must provide a mechanism for guards to validate that property is assigned to an individual (e.g., read the property pass information off the Campus Card contact chip or from the database) and to document the property review.

The contractor provide management visibility into development efforts through established Independent Verification & Validation (IV&V) methodologies as outlined in the FSA Quality Assurance Handbook, Version 3, dated February 15, 2006 (flexibility of areas of focus based on management priorities, risk assessment and available funding). The IV&V contractor will provide support through development, implementation and operational activities.

The Contractor shall also provide enterprise-level project management services in the nine (9) PMBOK areas: Project Scope Management, Project Time Management, Project Cost Management, Project Quality management, Project Human Resource Management, Project Communications Management, Project Risk Management, Project Procurement Management and Project Integration Management as required areas.

3.E. Period and Place of Performance

The majority of the work will be conducted at FSA's headquarters in Washington, DC. However, there may be activities that can be performed at the contractor's site.

Period of performance shall commence on the date of award and conclude twelve (12) months hence with two (2) option periods each for twenty-four (24) months.

4. PERFORMANCE WORK STATEMENT

4.A. Objectives

The contractor's support to the FSA Project Manager will be (1) to assist in the development of the FSA internal project management activities and resulting deliverables; and, (2) the review and analysis of the APPS Service Area-2 development contractor and/or the Service Area-3 testing contractor's system processes and deliverables.

During the Option Periods, the contractor will provide enhancements to Property Pass system such as:

- Establishment of an audit trail for portable property, i.e., Blackberry PDAs, assigned from a property manager to an individual employee in a centralized database; and
- Integration into the FSA's Financial Management System (FMS) Oracle asset management database.

Also, the government may require the contractor to incorporate its FlexiPlace Work Agreement into this APPS application. Copy of this agreement is provided as Attachment G.

Using the template provided as Attachment C, Contractor must propose level of effort necessary to produce deliverables and to achieve overall project goal.

ID	Service Area	Deliverables
1.A	Investment Management	OMB 300 Exhibit
1.B		Independent Cost Estimate
2.A	Acquisition Management	Market Research Results (IT System Integrators with experience in automating paper processes and systems)
2.B.		Acquisition and Source Selection Plan
3.A	Program/Project Management	Preliminary Work Breakdown Structure (Level 2)
3.B		Methodology for Monitoring EVM compliance
3.C.		Project Management Plan

ID	Service Area	Deliverables
3.D.	Program/Project Management	Risk Management Plan
4.A	Independent Verification and Validation	IV&V Plan and Document Review Process
4.B		IV&V Document Review Comments
4.C		Analysis Documents as required such as Memorandum of Record (MOR), Compliance Reviews, etc.
4.D		Analysis of Requirements Verification Matrix (RVM)
4.E		Lessons Learned Report using the Lessons Learned Template in IV&V Handbook
5.A	Program Quality Assurance and Enterprise Quality Management	Methodology for Establishing Enterprise-Wide Quality Assurance Program Metrics
5.B		Methodology for Establishing Enterprise-Wide Quality Management Processes

4.B. Performance Measurements

Quality Expectations

- Completeness: Deliverables will be 100% complete.
- Accuracy: Deliverables will be 100% accurate.
- Timeliness: All deliverables will be on time and within schedule.
- Communication: Communication with client/customers is professional.

4.C. Constraints

The contractor shall adhere to the following constraints in its performance of these services:

1. Federally mandated rules and regulations
 - Clinger-Cohen Act of 1996
 - OMB 300 Guidelines and Recommendations
 - OMB Capital Planning Guide
 - GAO Government Auditing Standards (The Yellow Book) of 2003
2. Industry standards
 - NIST (National Institute of Standards and Technology) Special Pub. 500-234
 - IEEE (Institute of Electrical and Electronics Engineers) Guidelines
 - Information Technology Review Board (IRTB) Recommendation
 - SEI (Software Engineering Institute) Capability Maturity Models (CMMI®)
 - PMI (Project Management Institute) PMBOK® (IEEE Standard 1490-2003)
 - IBM (International Business Machines) Rational Unified Process®
 - Society of Cost Guidelines Estimating & Analysis
3. Departmental standards (see FSA CIO's Library at <http://www.fsa.ed.gov/business/library.html>)